

Approved For Release 2002/11/12 : CIA-RDP82-00357R000700020020-5

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SECURITY INFORMATION

YOUR PERSONNEL EVALUATION REPORT

**Office of Personnel
Forms Management Program
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Issued Jointly by

THE OFFICE OF TRAINING
and
THE PERSONNEL OFFICE

AUGUST 1952

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AN INSTRUCTIONAL GUIDE IN THE USE OF THE PERSONNEL EVALUATION REPORT

In accordance with the basic personnel policy of the Agency, a program of personnel evaluation has been established as a principal means of developing the most satisfactory working relationship between each individual and his supervisor.

To insure a fundamental understanding of the objectives of personnel evaluation and to get under way the initial program of personnel evaluation reporting throughout the Agency, it is important that each individual in the organization become thoroughly familiar with Agency Notices No. issued on 1 August 1952.

Definition of Personnel Evaluation

Personnel evaluation as used in this Agency is a supervisor's considered and judicious appraisal of the performance and capabilities of each individual for whom he is immediately responsible.

This evaluation is in terms of the requirements of your current position and your potential for long-term service with the Agency. It is not a performance or an efficiency rating in the sense that you are compared with others on the basis of a predetermined adjectival or numerical scale.

The significance of this personnel evaluation program lies in the constructive action which will be taken to develop and use your abilities and potentialities most effectively.

Specific Uses of Personnel Evaluation

To identify each person's aptitudes, knowledge, skills, and interests.

To promote discussions between supervisors and those supervised concerning work performance and career development.

To increase individual efficiency by spotting and correcting specific problems and deficiencies and helping in the development of desirable traits.

- To serve as a basis for individual plans for career development.
- To identify outstanding service.
- To identify individuals who fail to perform as effective members of the organization.
- To identify the need for training, reassignment, rotation, promotion, demotion, separation, and other formal personnel actions.
- To indicate suitability for re-employment for each individual in the process of separation from the Agency.

Form and Frequency of Personnel Evaluation Reports

The Personnel Evaluation Report (Form No. 37-151), is the official form that has been approved for recording personnel evaluations.

Agency Notice [] outlines the types of Personnel Evaluation Reports and shows in a flow chart the steps to be followed in processing these reports. Read this Notice thoroughly; it gives you the basic doctrine of the personnel evaluation program of this Agency.

Supervisors are required to prepare a personnel evaluation report for each individual at the end of the individual's first nine months of service with the Agency and annually thereafter, and at such other times as directed.

The schedule to be followed in filing Personnel Evaluation Reports for departmental [] personnel during October, November, and December 1952 is given in Agency Notice [] This should be carefully checked, especially by each supervisor.

PERSONNEL EVALUATION REPORT—Form No. 37-151

Page 1. The Cover

The Personnel Evaluation Report has been designed as an important element in the Agency Career Service Program, for continual evaluation of performance and potentialities is inherent in any soundly organized career service.

Page 2. Inside Front Cover

An Evaluations Officer (administrative or personnel officer) has been designated for each Office or major component of the Agency. He is responsible for the administrative activities connected with the personnel evaluation program in his Office or organizational component.

The Evaluations Officer will initiate action on Form No. 37-151 by entering the identifying data in items 1 through 6 and forwarding the form in duplicate to your supervisor.

The instructions given on the second page of Form No. 37-151 provide some generally helpful suggestions. If you have any questions about these instructions, be sure to discuss them with your supervisor.

Keep in mind that frank discussion between you and your supervisor is essential, both before filling in the form and after it has been reviewed by a reviewing official. Such discussions should include a thorough explanation of the objectives of the personnel evaluation program and the responsibilities for following up the recommendations and suggestions contained in the report.

Page 3. Front of the Report Form

Items 1 through 6. Since the Evaluations Officer for your organizational component will fill in items 1 through 6, it will only be necessary for you to check over these items to make sure that they are correct.

Item 1. Is your name given and spelled as you use it for Agency purposes?

Item 2. Is your present grade the same as the one shown on this form?

Item 3. Is your present position title the same as the one shown?

Item 4. Are the Office, Staff or Division, and Branch designations correct for your present position? ☐ the approved Agency designation should be used.

Item 5. To activate the personnel evaluation reporting program as rapidly as possible throughout the Agency, the schedule for the preparation of annual reports has been telescoped from twelve months into three months.

Between 1 October and 31 December 1952, an *Annual* report will be prepared for each individual who will have completed *more than nine months of service in the Agency as of 1 October 1952*. The due date of an Annual report will be determined by the individual's EOD date according to the schedule in Agency Notice ☐ For example, if your EOD date is 5 June, your first Annual report will become due on 5 October

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1952; if your EOD date is 10 May, your first Annual report will become due on 10 December 1952. All *first* Annual reports will cover the twelve months prior to the due date of the report or the time that you have been in the Agency if less than one year.

If an *Annual* report becomes due according to the schedule in Agency Notice , and you have not worked under your present supervisor for a period of at least ninety days, the due date of the Annual report will be deferred until you have been under your present supervisor's jurisdiction for ninety days.

After 1 October 1952, an *Initial* report will be prepared for each individual as of the date that he completes his first nine months of service in the Agency, exclusive of time spent in provisional status pending full security clearance.

An *Initial* report will be made by the supervisor you have at the time the report is due, regardless of the amount of time that you have been under that supervisor's jurisdiction. If you have questions concerning the period covered by your first Annual report, check with your supervisor.

Item 6. Your first Personnel Evaluation Report will be *Initial* or *Annual*. From the preceding discussion of item 5, you will know which is correct in your case.

Items 7 through 10. You will fill in these items. In addition to the instructions given in the report form, keep in mind the following suggestions:

Item 7. The space available in this form is necessarily limited. Rough out the outline of your major duties before filling in this item. Your supervisor will describe your performance on the major duties that you list here.

Item 8. Give the course title, such as "Elementary Russian," "Advanced Statistics," "Geography of the Antarctic," under name of course.

Location means the institution and the city—state and county if necessary.

Length of course in months: Specify the number of semester or quarter hours of credit.

Date completed: Do not write the month as a numeral.

Item 9. Give considerable thought to this question; rough out your reply before filling in the form.

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Item 10. Give date of filling in the form. Sign with your usual signature for Agency purposes.

Items 11 through 18. These items will be filled in by your supervisor as of the date that this report is due. If you have been under more than one supervisor for the period of this report, your supervisor will usually consult your previous supervisors before filling in these items.

Item 11. Since your supervisor is requested to describe briefly your performance on the major duties listed under item 7, it is of the greatest importance that you and your supervisor agree on the list of your major duties, and that these duties be listed realistically in terms of your daily work.

Page 4. Back of the Report Form

Item 12. This item gives your supervisor an opportunity to record his recognition of significant contributions that you have made.

Item 13. Each of us can improve his total performance on the job by giving attention to details that may be overlooked in the press of getting each day's work done. Where improvement can be made, it is helpful to know about it.

Item 14. The purpose of this question is to give careful attention to potentialities that may be developed.

Item 15. This question gives your supervisor an opportunity to indicate other duties which may better suit your abilities.

Item 16. The supervisor will make recommendations regarding training or rotation only after you have had an opportunity to discuss your interests with him, and only after he has discussed with the reviewing official the opportunities that there may be for you in training or rotation plans. The recommendations contained in this item must be the supervisor's, but their value will depend upon your interest and the practicality of the suggestions.

Item 17. If your work has been unsatisfactory, you will probably have received a warning memorandum to that effect. This item insures that anyone whose work has been unsatisfactory will be given an official notice.

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- Item 18. Within one week, or as soon as possible after the Personnel Evaluation Report has been reviewed and returned to your supervisor, he will talk over the Personnel Evaluation Report with you and will sign and date this item.
- Item 19. This will be signed and dated by the reviewing official — usually your supervisor's supervisor.
- Item 20. Space is provided for further comments or overflow from the previous items. In addition, for each individual in the process of separation from the Agency, item 20 should include a statement regarding that person's suitability for re-employment in the Agency.

THE PRIMARY OBJECTIVE OF THE PERSONNEL EVALUATION
PROGRAM IS TO PROMOTE THE
FULLEST DEVELOPMENT OF EACH INDIVIDUAL IN THE AGENCY.

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